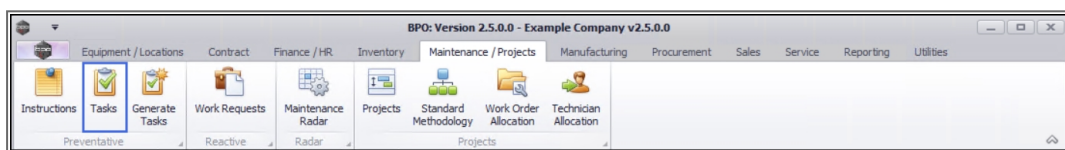


MAINTENANCE

TASKS - GENERATION METHODOLOGY

(Task Interval/Schedule Definition)

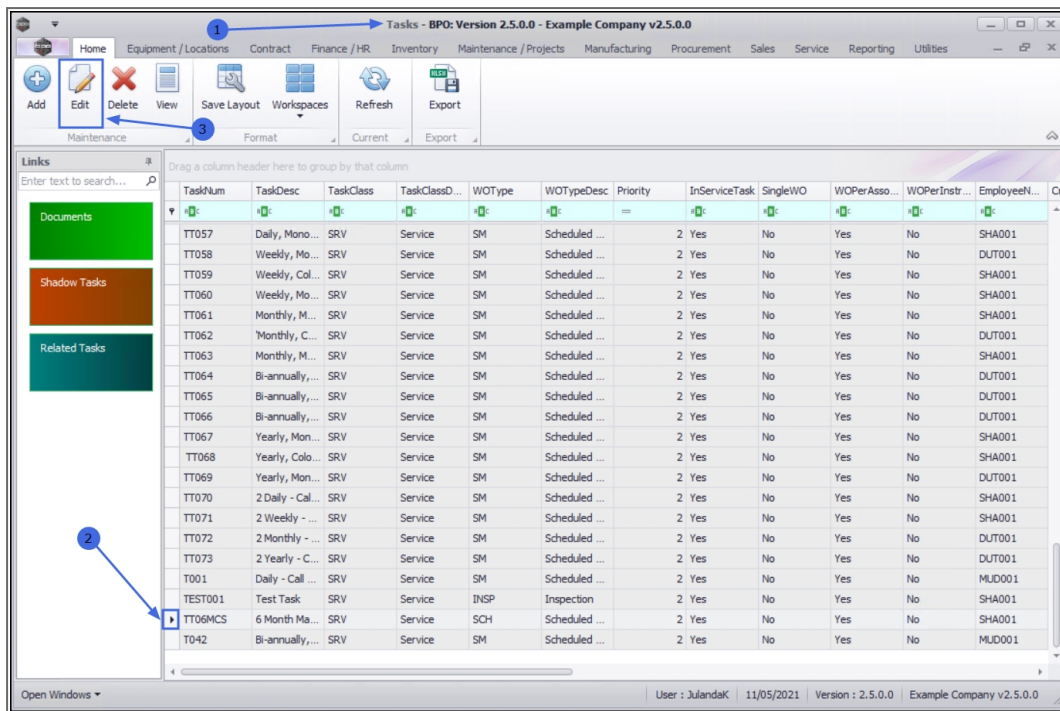
Ribbon Access: *Maintenance / Projects > Tasks*



1. The **Tasks** listing screen will be displayed.
2. Click on the **row** of the task you wish to create a schedule definition for.
3. Click on **Edit**.



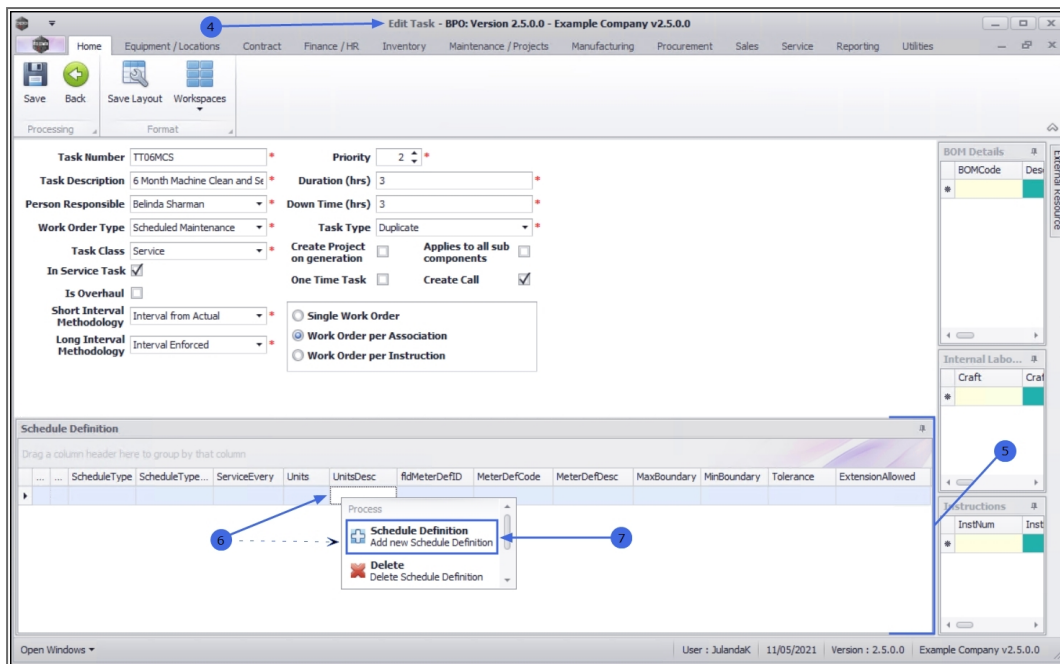
Short cut key: **Right click** to display the **All groups** menu list. Click on **Edit**.



4. The **Edit Task** screen will be displayed.

ADD SCHEDULE DEFINITION

5. **Expand** the Schedule Definition panel until all the columns can be viewed. This will make it easier to work with.
6. **Right click** anywhere in the new row to display the **Process** menu list.
7. Click on **Schedule Definition** - Add new Schedule Definition.



TIME BASED SCHEDULE

8. The **Select a Schedule Type** screen will be displayed.
 - i. There are **two** interval types available;
 - **Time Based Schedule**¹
 - **Condition Based Schedule**²
 - ii. Click on the **row** of the **Time Based Schedule** type as this is the definition being created for the task.
 - iii. Click on **OK**.

¹The Time Based Schedule refers to days, weeks, months and years

²The Condition Based Schedule refers to a meter definition based schedule, e.g. copies made

Edit Task - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Task Number TT06MCS
Task Description 6 Month Machine Clean and Se
Person Responsible Belinda Sharman
Work Order Type Scheduled Maintenance
Task Class Service
In Service Task ☒
Is Overhaul ☐
Short Interval Methodology Interval from Actual
Long Interval Methodology Interval Enforced

Priority 2
Duration (hrs) 3
Down Time (hrs) 3
Task Type Duplicate
Create Project on generation ☐ **Applies to all sub components** ☐
One Time Task ☐ **Create Call** ☒

BOH Details
 BOMCode Des
 [Yellow Cell] [Green Cell]

Schedule Definition
 Drag a column header here to group by that column

	ScheduleType	ScheduleType...	ServiceEvery	Units	UnitsDesc	fIdMeterDefId	Meter
I 93 0			0.00 0	0			0

Select a Schedule Type

Home Ok Back Save Layout
 Process Format

Drag a column header here to group by that column

fId Code	fId Code De...	fId Code Type
C	Condition	None
T	Time	None

Open Windows

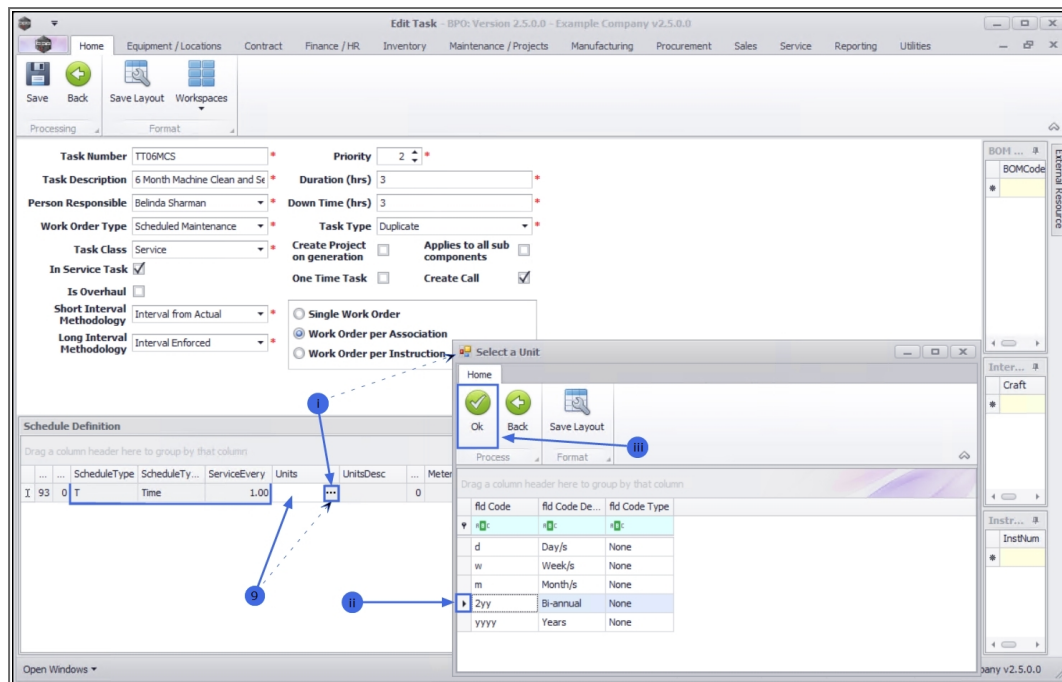
User : JulandaK 11/05/2021 Version : 2.5.0.0 Example Company v2.5.0.0

- **Schedule Type:** This field is populated with the schedule type code you have selected.
- **Schedule Type Desc:** This field is populated with the schedule type description you have selected.
- **Service Every:** Click in the text box and *type* in or use the *arrow* indicators to select the **service performance interval**¹.

Add the Units

9. Click in the **Units** text box to display the *ellipsis* button.
 - i. Click on this button to display the **Select a Unit** screen.
 - ii. Click on the **row** of the unit code that you wish to link to this schedule definition.
 - iii. Click on **OK**.

¹This interval depends on the schedule type, e.g. 6 for 6 months for a Time Schedule Type or 5000 for 5000 mono/colour copies for a Condition Schedule Type



Edit Task - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Task Number: TT06MCS
Task Description: 6 Month Machine Clean and St
Person Responsible: Belinda Sharman
Work Order Type: Scheduled Maintenance
Task Class: Service
In Service Task: ☒
Is Overhaul: ☐
Short Interval Methodology: Interval from Actual
Long Interval Methodology: Interval Enforced

Priority: 2
Duration (hrs): 3
Down Time (hrs): 3
Task Type: Duplicate
Create Project on generation: ☐
One Time Task: ☐
Applies to all sub components: ☒
Create Call: ☒

Single Work Order
Work Order per Association
Work Order per Instruction

Schedule Definition

ScheduleType	ScheduleTy...	ServiceEvery	Units	UnitsDesc	Meter
I 93	0	T	Time	1.00	0

Select a Unit

fid Code	fid Code De...	fid Code Type
d	Day/s	None
w	Week/s	None
m	Month/s	None
2yy	Bi-annual	None
yyyy	Years	None

- **Units:** The text box will be populated with the unit code you have selected.
- **Unit Desc:** The text box will be populated with the unit code description you have selected.



Note: The *Meter Definition Code*, *Meter Definition Desc*, *Max Boundary* and *Min Boundary* text boxes are not required when setting up the time schedule definition, but will be required when setting up the Condition schedule type definition.

- **Tolerance:** Click in the text box and **type** or use the **arrow** indicators to select the tolerance in which the task can be performed in, without affecting the next due execution point, if applicable.
- **Extension Allowed:** Click in the text box and **type** or use the **arrow** indicators to select the extension allowed for the task to be performed, if applicable.

The **Time schedule definition** has now been completed for this task.

Edit Task - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Task Number: TT06MCS

Task Description: 6 Month Machine Clean and St

Person Responsible: Belinda Sharman

Work Order Type: Scheduled Maintenance

Task Class: Service

In Service Task: ☒

Is Overhaul: ☐

Short Interval Methodology: Interval from Actual

Long Interval Methodology: Interval Enforced

Priority: 2

Duration (hrs): 3

Down Time (hrs): 3

Task Type: Duplicate

Create Project on generation: ☐

Applies to all sub components: ☐

One Time Task: ☐

Create Call: ☒

Single Work Order: ☐

Work Order per Association: ☒

Work Order per Instruction: ☐

Schedule Definition

Drag a column header here to group by that column

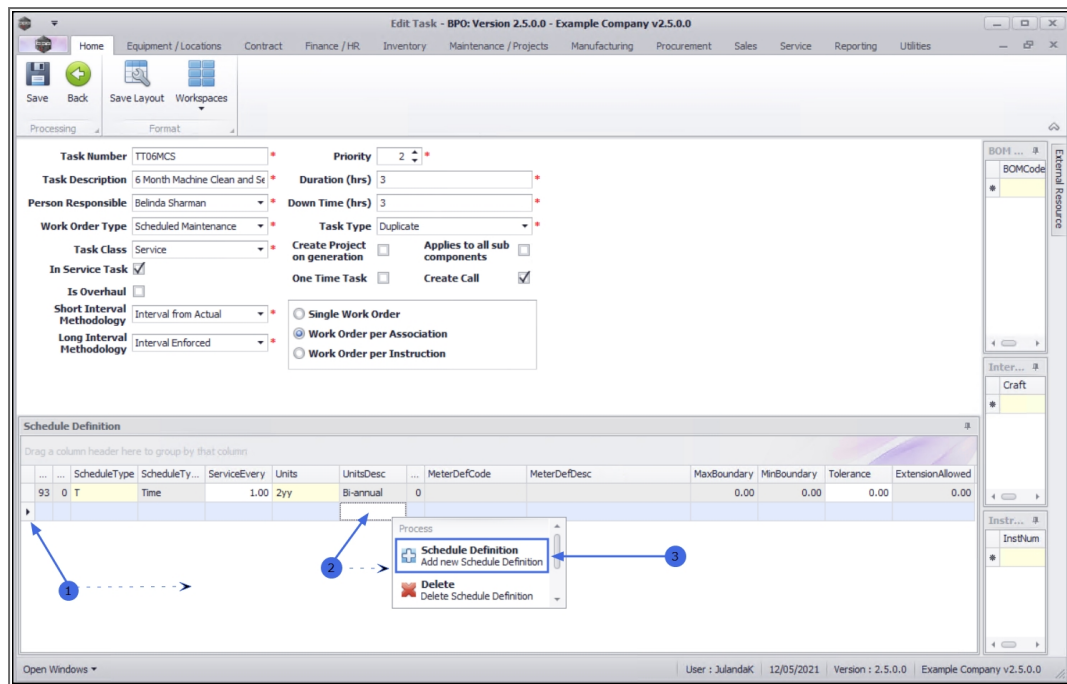
	ScheduleType	ScheduleTy...	ServiceEvery	Units	UnitsDesc	MeterDefCode	MeterDefDesc	MaxBoundary	MinBoundary	Tolerance	ExtensionAllowed
I 93 0 T	Time		1.00	2yy	Bi-annual	0		0.00	0.00	0.00	0.00

Open Windows

User: JulandaK | 12/05/2021 | Version: 2.5.0.0 | Example Company v2.5.0.0

CONDITION SCHEDULE DEFINITION

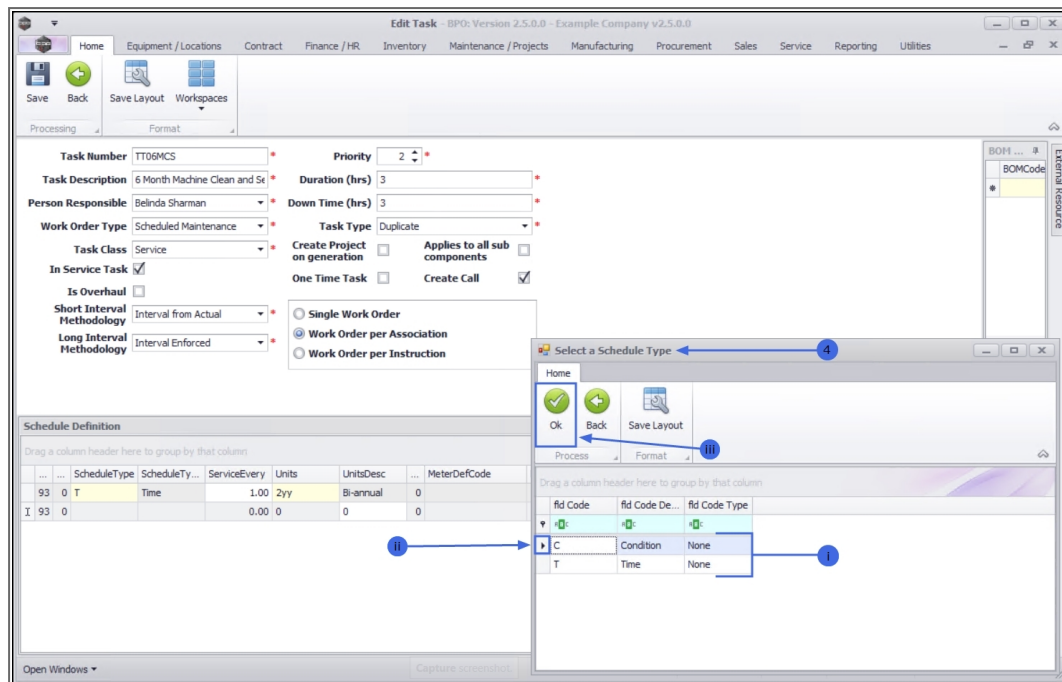
1. Click anywhere in the Schedule Definition grid area to open a **new row**.
2. **Right click** anywhere in the **new row** to display the **Process** menu.
3. Click on the **Schedule Definition** - Add new Schedule Definition.



4. The **Select a Schedule Type** screen will be displayed.
 - i. There are **two** interval types available;
 - **Time Based Schedule¹**
 - **Condition Based Schedule²**
 - ii. Click on the **row** of the **Condition** Based Schedule as this is the definition being created for the task.
 - iii. Click on **OK**.

¹The Time Based Schedule refers to days, weeks, months and years

²The Condition Based Schedule refers to a meter definition based schedule, e.g. copies made



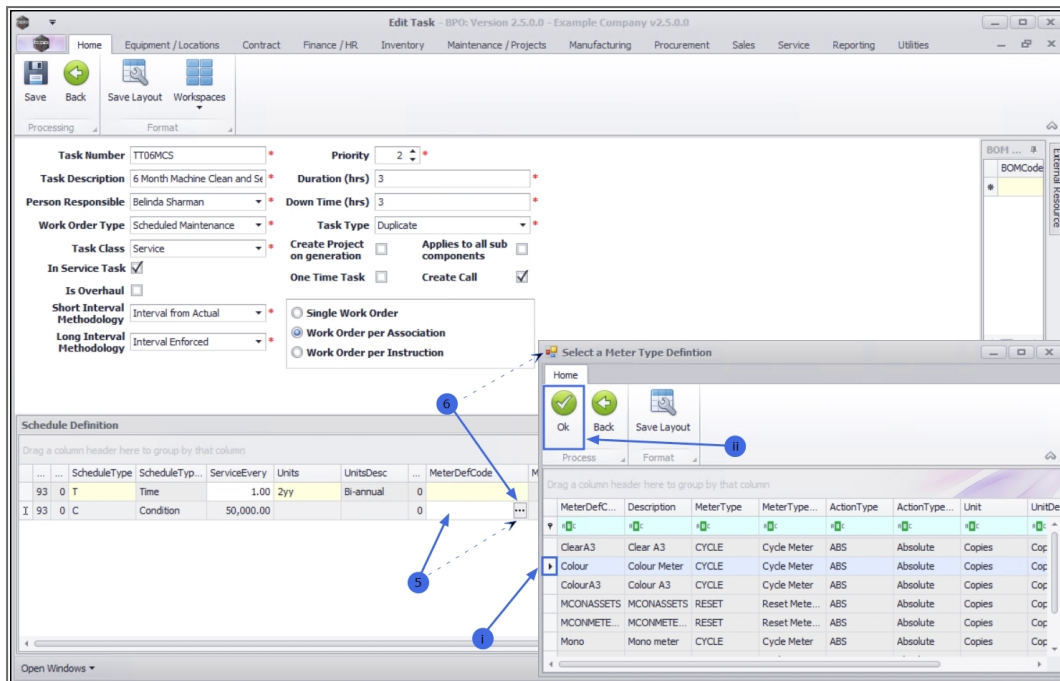
- **Schedule Type:** This field is populated with the schedule type code you have selected.
- **Schedule Type Desc:** This field is populated with the schedule type description you have selected.
- **Service Every:** Click in the text box and **type** or use the **arrow** indicators to select the **service performance interval**¹.

Add the Meter Code

5. Click in the **Meter Definition Code** text box to display the **ellipsis** button.
6. Click on this button to display the **Select a Meter Type Definition** screen.
 - i. Click on the **row** of the meter definition that you wish to link to this schedule definition.

¹This interval depends on the schedule type, e.g. 6 for 6 months for a Time Schedule Type or 5000 for 5000 mono/colour copies for a Condition Schedule Type

ii. Click on **OK**.



Edit Task - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Task Number: TT06MCS
 Task Description: 6 Month Machine Clean and St
 Person Responsible: Belinda Sharman
 Work Order Type: Scheduled Maintenance
 Task Class: Service
 In Service Task: ☒
 Is Overhaul: ☐
 Short Interval Methodology: Interval from Actual
 Long Interval Methodology: Interval Enforced

Priority: 2
 Duration (hrs): 3
 Down Time (hrs): 3
 Task Type: Duplicate
 Create Project on generation: ☐
 Applies to all sub components: ☐
 One Time Task: ☐
 Create Call: ☒

Schedule Definition

ScheduleType	ScheduleTyp...	ServiceEvery	Units	UnitsDesc	MeterDefCode
93	0 T	Time	1.00	2yy	Bi-annual
I 93	0 C	Condition	50,000.00		0

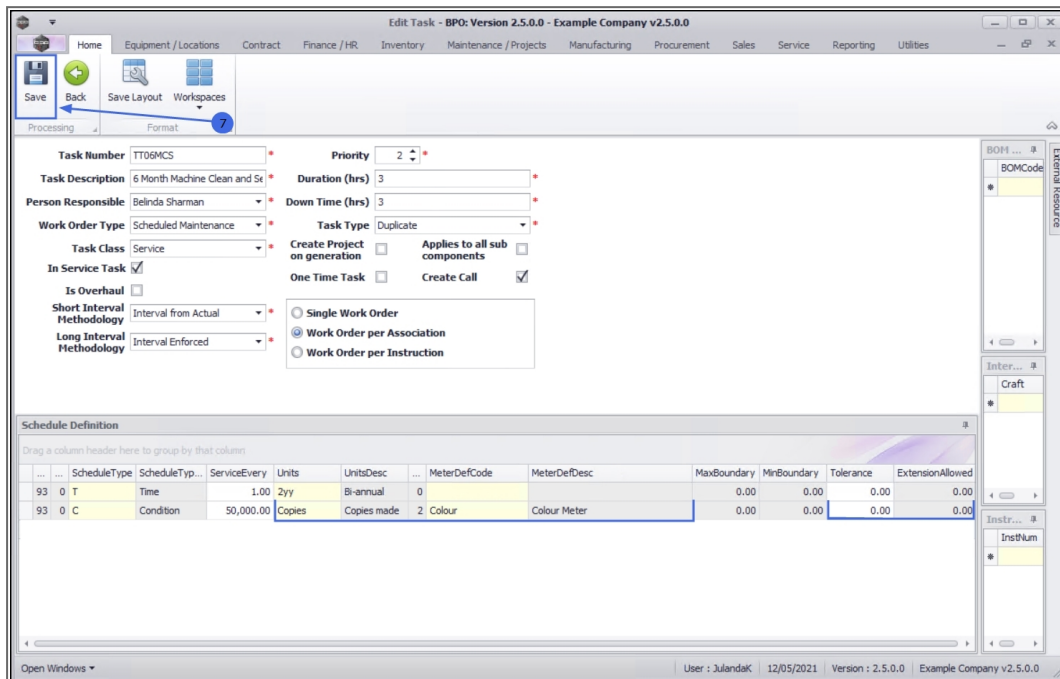
Select a Meter Type Definition

MeterDefC...	Description	MeterType	MeterType...	ActionType	ActionType...	Unit	UnitDes
ClearA3	Clear A3	CYCLE	Cycle Meter	ABS	Absolute	Copies	Cop
ColourA3	Colour Meter	CYCLE	Cycle Meter	ABS	Absolute	Copies	Cop
ColourA3	Colour A3	CYCLE	Cycle Meter	ABS	Absolute	Copies	Cop
MCONASSETS	MCONASSETS	RESET	Reset Mete...	ABS	Absolute	Copies	Cop
MCONMETE...	MCONMETE...	RESET	Reset Mete...	ABS	Absolute	Copies	Cop
Mono	Mono meter	CYCLE	Cycle Meter	ABS	Absolute	Copies	Cop

- **Units:** This text box will be populated with the meter type units you have selected.
- **Units Description:** This text box will be populated with the meter type description you have selected
- **Meter Definition Code:** This text box will be populated with the meter type definition you have selected.
- **Meter Definition Desc:** This text box will be populated with the meter type definition description you have selected.
- **Tolerance:** Click in the text box and **type** or use the **arrow** indicators to select the tolerance in which the task can be performed in, without affecting the next due execution point, if applicable.
- **Extension Allowed:** Click in the text box and **type** or use the **arrow** indicators to select the extension allowed for the task to be performed, if applicable.

SAVE DEFINITION DETAILS

7. When you have finished linking the definition details, click on **Save**.



Edit Task - BPO: Version 2.5.0.0 - Example Company v2.5.0.0

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting | Utilities

Save | Back | Save Layout | Workspaces

Processing | Format

Task Number TT06MCS
Task Description 6 Month Machine Clean and St
Person Responsible Belinda Sharman
Work Order Type Scheduled Maintenance
Task Class Service
In Service Task ☒
Is Overhaul ☐
Short Interval Methodology Interval from Actual
Long Interval Methodology Interval Enforced

Priority 2
Duration (hrs) 3
Down Time (hrs) 3
Task Type Duplicate
Create Project on generation ☐
One Time Task ☐
Applies to all sub components ☐
Create Call ☒

Single Work Order
Work Order per Association
Work Order per Instruction

Schedule Definition

Drag a column header here to group by that column

	ScheduleType	ScheduleTyp...	ServiceEvery	Units	UnitsDesc	MeterDefCode	MeterDefDesc	MaxBoundary	MinBoundary	Tolerance	ExtensionAllowed
93	0	T	Time	1.00	2yr	Bi-annual	0	0.00	0.00	0.00	0.00
93	0	C	Condition	50,000.00	Copies	Copies made	2 Colour	0.00	0.00	0.00	0.00

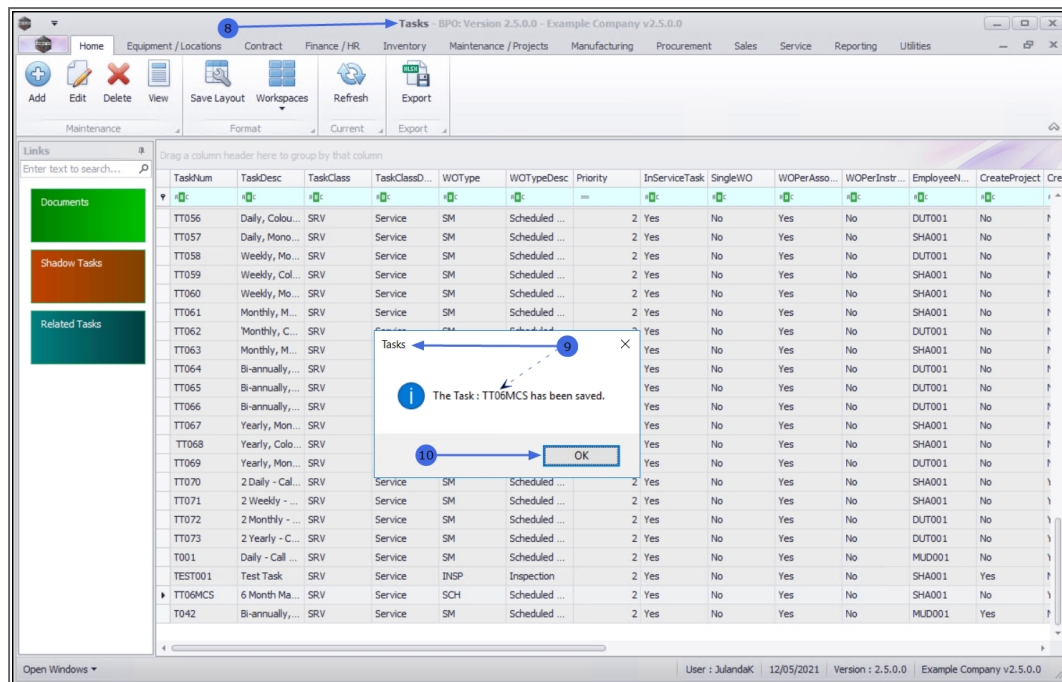
Open Windows | User : JulandaK | 12/05/2021 | Version : 2.5.0.0 | Example Company v2.5.0.0

8. You will return to the **Tasks** list screen.

9. When you receive the **Tasks** message to confirm that;

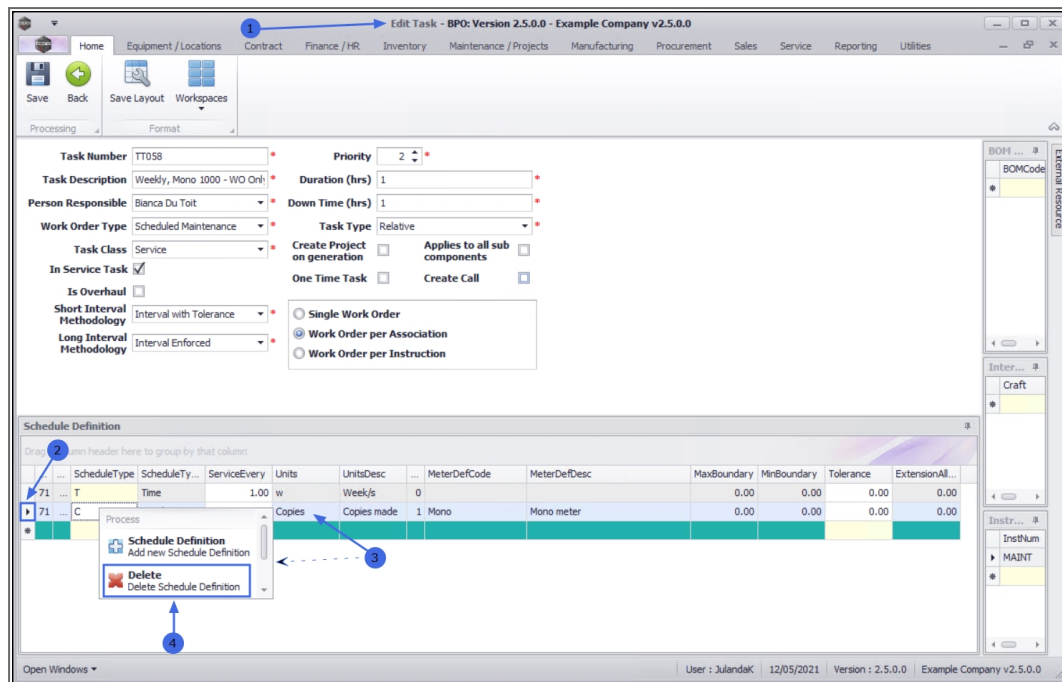
- **The Task: [task number] has been saved.**

10. Click on **OK**.



REMOVE A SCHEDULED DEFINITION FROM A TASK

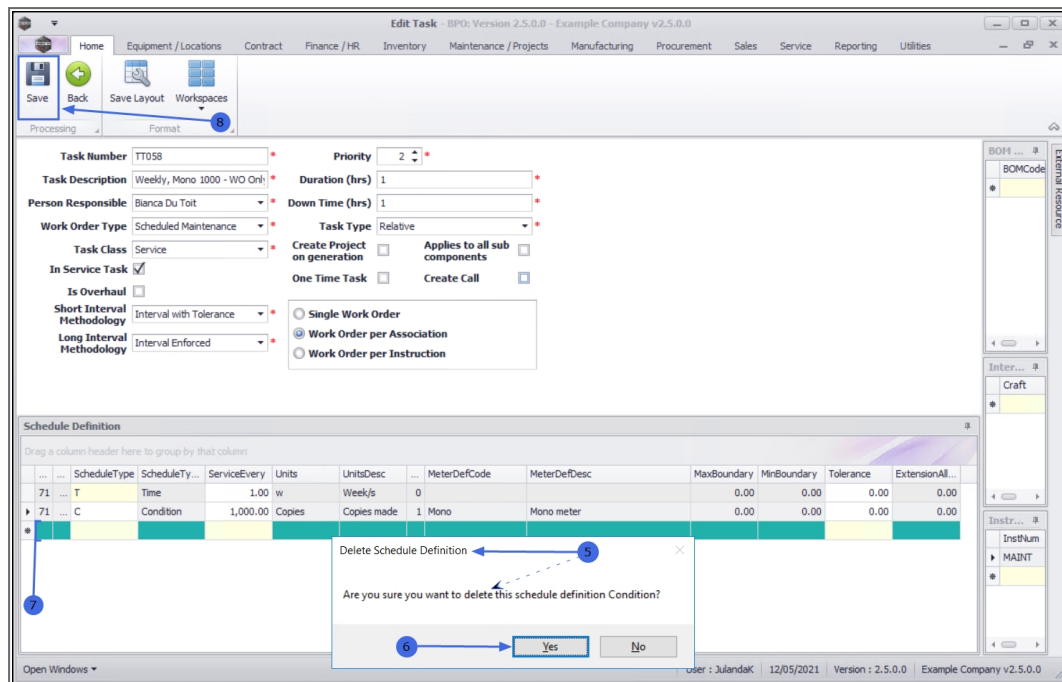
1. From the **Edit Task** screen,
2. Click on the **row** of the schedule definition you wish to remove from the task.
3. **Right click** anywhere in the row to display the **Process** screen.
4. Select **Delete** - Delete Schedule Definition.



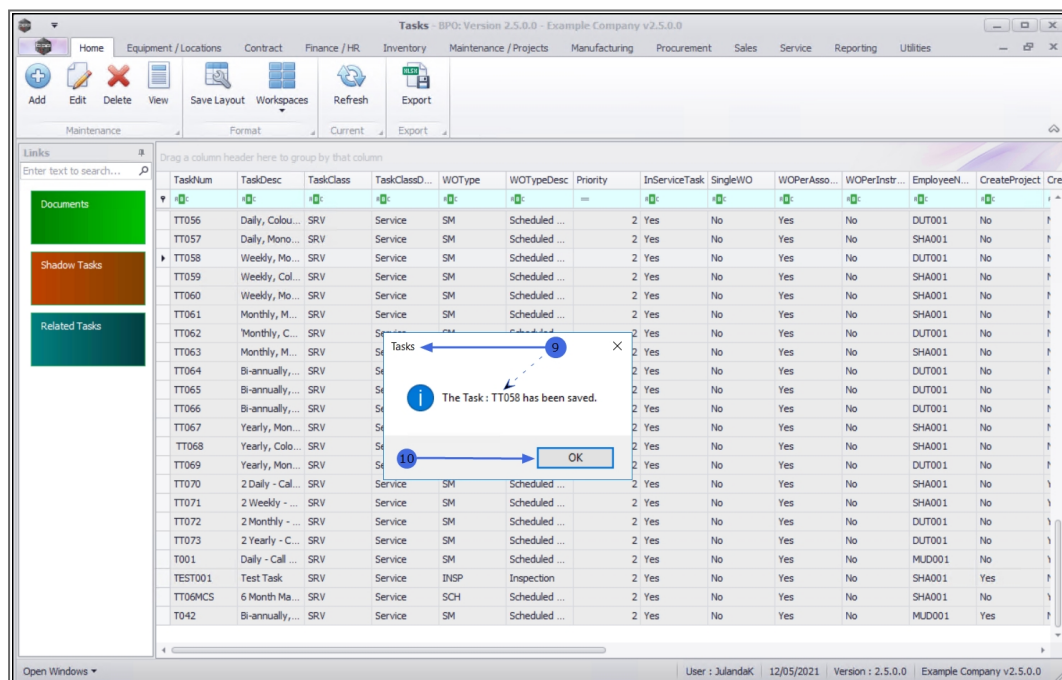
5. When you receive the **Delete Schedule Definition** message to confirm;
 - **Are you sure you want to delete this schedule definition Condition?**
6. Click on **Yes** if you are certain about your selection or,
 - Click on **No** to ignore the request and to leave the schedule definition linked to the task.
7. The schedule definition will be removed from the Task.

SAVE THE SCHEDULE DEFINITION

8. Click on **Save**.



9. You will return to the **Tasks** list screen.
10. When you receive the **Task** message to confirm that;
 - **The Task: [task number] has been saved.**
11. Click on **OK**.





MNU.044.004